



Making a Gift of Appreciated Stock

Thank you for considering making a gift of appreciated stock to support the Petaluma River Park!
To make a gift of appreciated stock, please complete the form below and submit to support@petalumariverpark.org.

Donor name(s): _____

Donor address: _____

Donor email: _____

Donor phone: _____ Phone type: _____

Security/stock name & ticker: _____

Number of shares you are transferring: _____

Any notes about the gift, including cost basis: _____

Use the information below to ask your broker to transfer shares:

Account Name: Petaluma River Park Foundation (Tax ID# 84-2431277)

Account Number: 3992-2794

DTC Clearing 0164, Code 40

Broker: Schwab Brokerage, Managed by Choreo
Noah Jacobson
noah.jacobson@choreoadvisors.com
707-582-8236 (office)
11 5th Street, Suite 108
Petaluma, CA 94952